



CONCORD MUNICIPAL LIGHT PLANT

ELECTRIC | BROADBAND | ENERGY MANAGEMENT

2021 Customer Survey



Report of Findings

10 August 2021
Confidential & Proprietary

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Harnessing the power of data to help clients achieve organizational goals.

Data to support strategic decisions to improve on products and services. Since 1979, our experience with study and instrument design, data collection, analysis, and formal presentation assists our clients in identifying the “why” and “what’s next.”

Talent with a knowledge base in a wide range of industries and methodologies ensures a 360° view of the challenges faced and the expertise to address them.

Solutions that are customized to provide a personalized approach of understanding organizational, employee, and customer needs allowing for more informed decisions.



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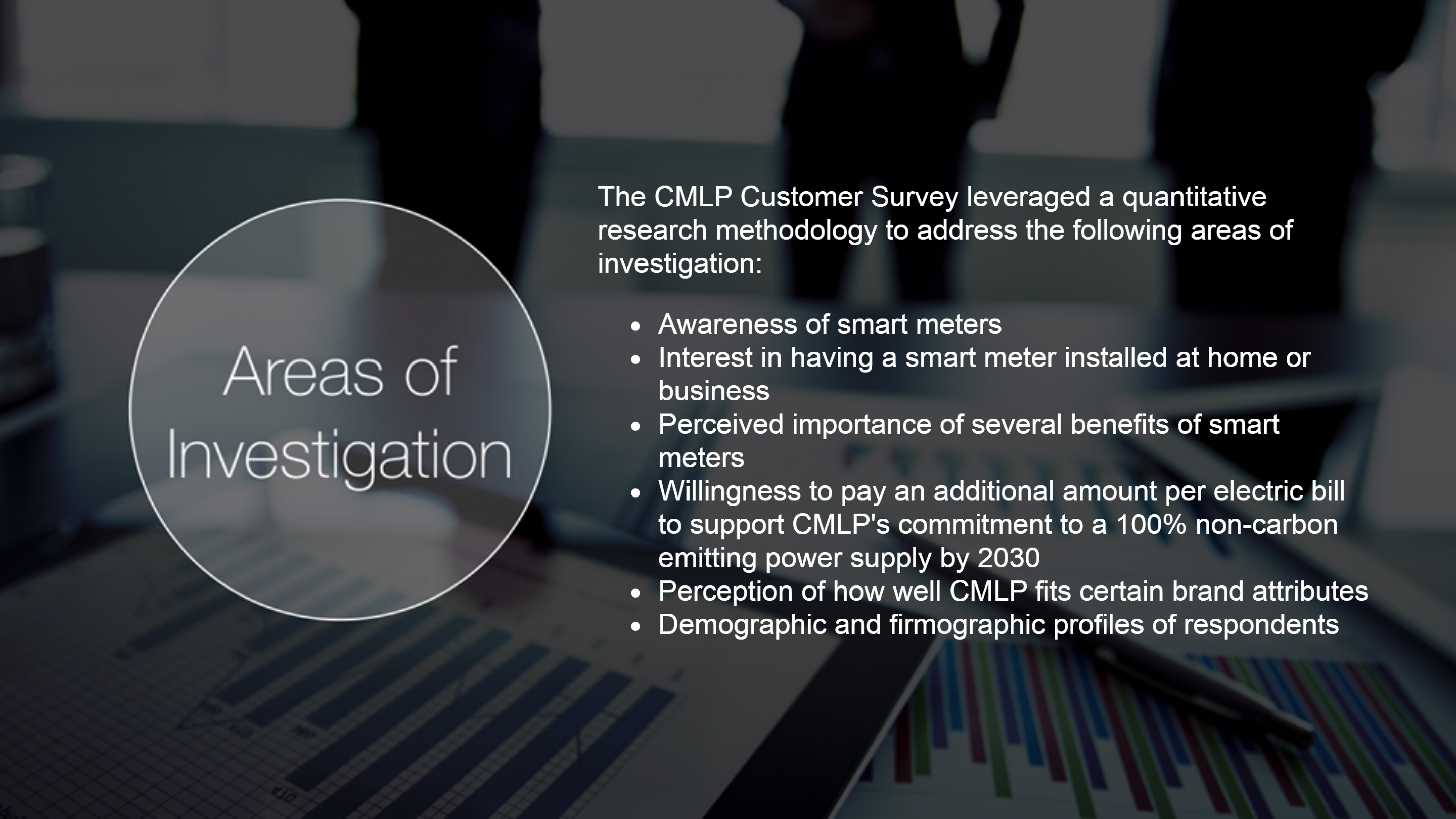
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Project Overview

- GreatBlue Research was commissioned by the Concord Municipal Light Plant (hereinafter “CMLP”) to conduct market research to understand their customers' awareness of and interest in smart meters.
- The primary goals for this research study were to assess customers' awareness of and interest in smart meters, perceived importance of benefits of smart meters, willingness to pay an additional amount per electric bill to support CMLP's non-carbon emitting power supply, and perception of how well CMLP fits certain brand attributes.
- In order to service these research goals, GreatBlue employed telephone and digital survey methodologies to capture the opinions of residential and commercial customers.
- The outcome of this research will enable CMLP to a) more clearly understand current awareness of smart meters, b) gauge customers' interest in having a smart meter installed at their home or business, and c) determine communication materials needed to educate customers of smart meters and build support for this program.



Areas of Investigation

The CMLP Customer Survey leveraged a quantitative research methodology to address the following areas of investigation:

- Awareness of smart meters
- Interest in having a smart meter installed at home or business
- Perceived importance of several benefits of smart meters
- Willingness to pay an additional amount per electric bill to support CMLP's commitment to a 100% non-carbon emitting power supply by 2030
- Perception of how well CMLP fits certain brand attributes
- Demographic and firmographic profiles of respondents

Research Methodology Snapshot - Residential

Methodology Digital	No. of Completes 1,011	No. of Questions 29*	Incentive None	Sample Customer List
Target Residential Customers	Quality Assurance Dual-level**	Margin of Error 2.6%	Confidence Level 95%	Research Dates June 28 - July 16, 2021

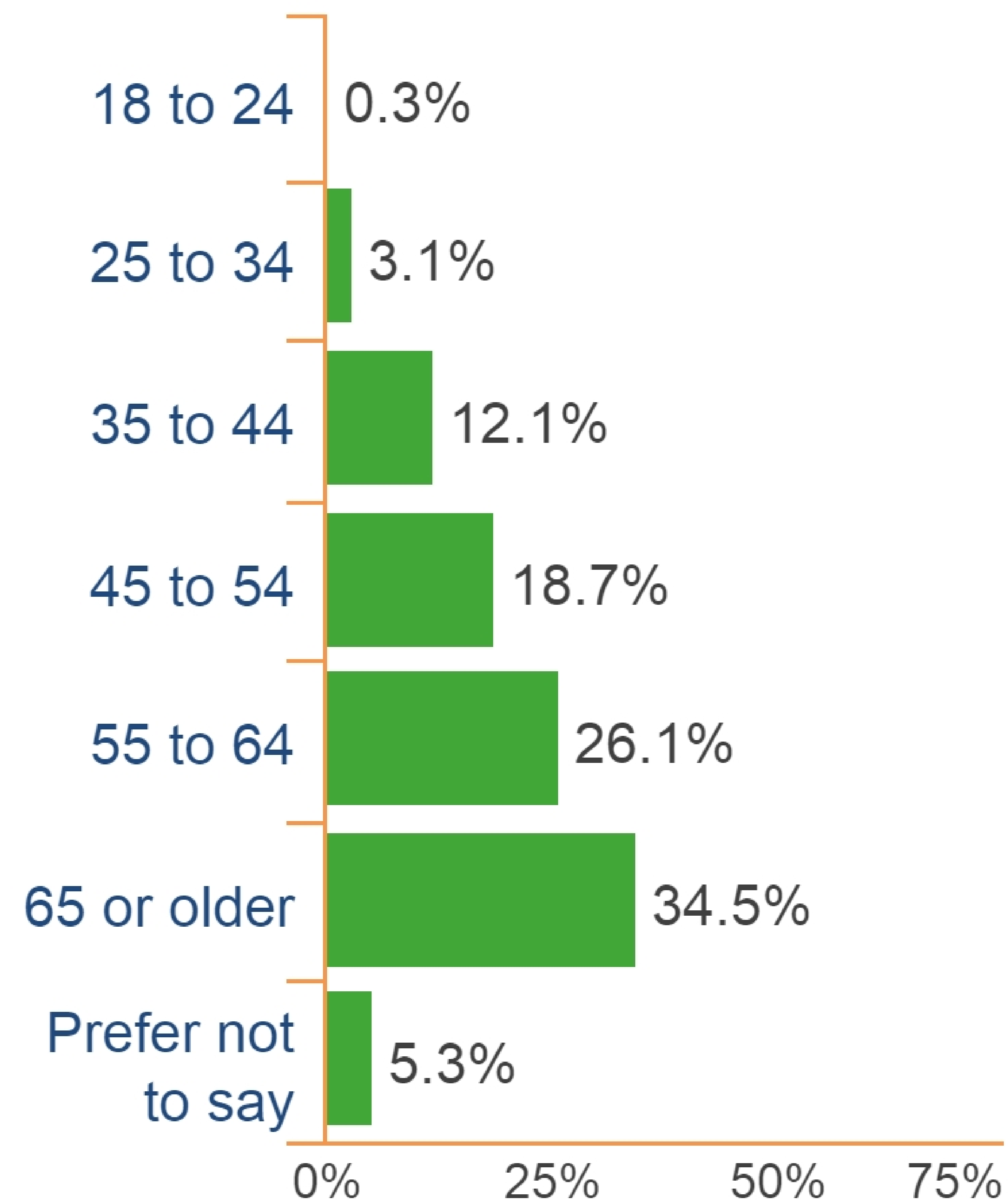
* This represents the total possible number of questions; not all respondents will answer all questions based on skip patterns and other instrument bias.

** Supervisory personnel, in addition to computer-aided interviewing platform, ensure the integrity of the data is accurate.

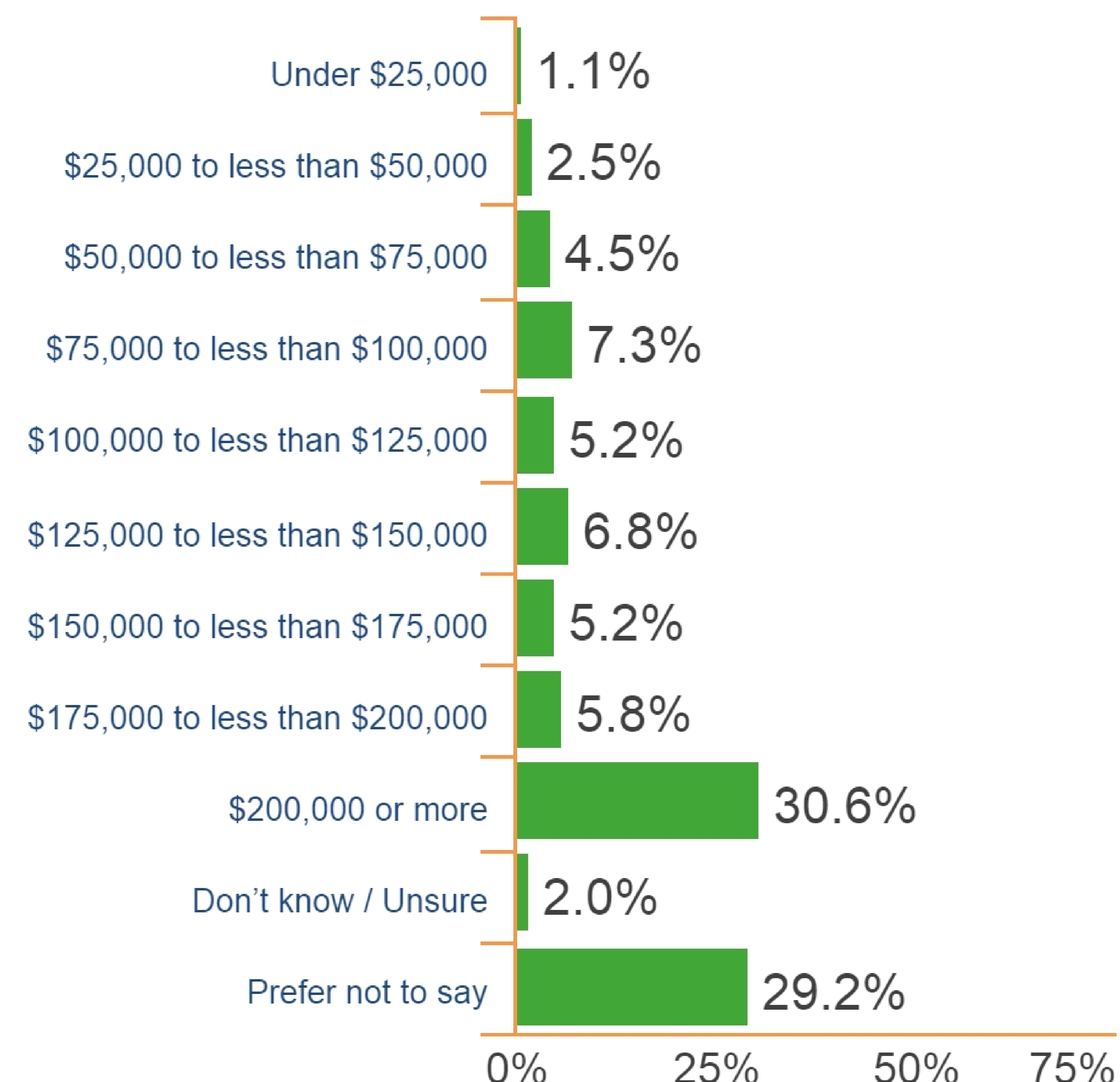
Respondent Snapshot - Residential

This slide quantifies select data points to provide context for this research study. The data is not meant to be proportional to population contribution, rather to provide an empirical view into the demographic profile of the participants.

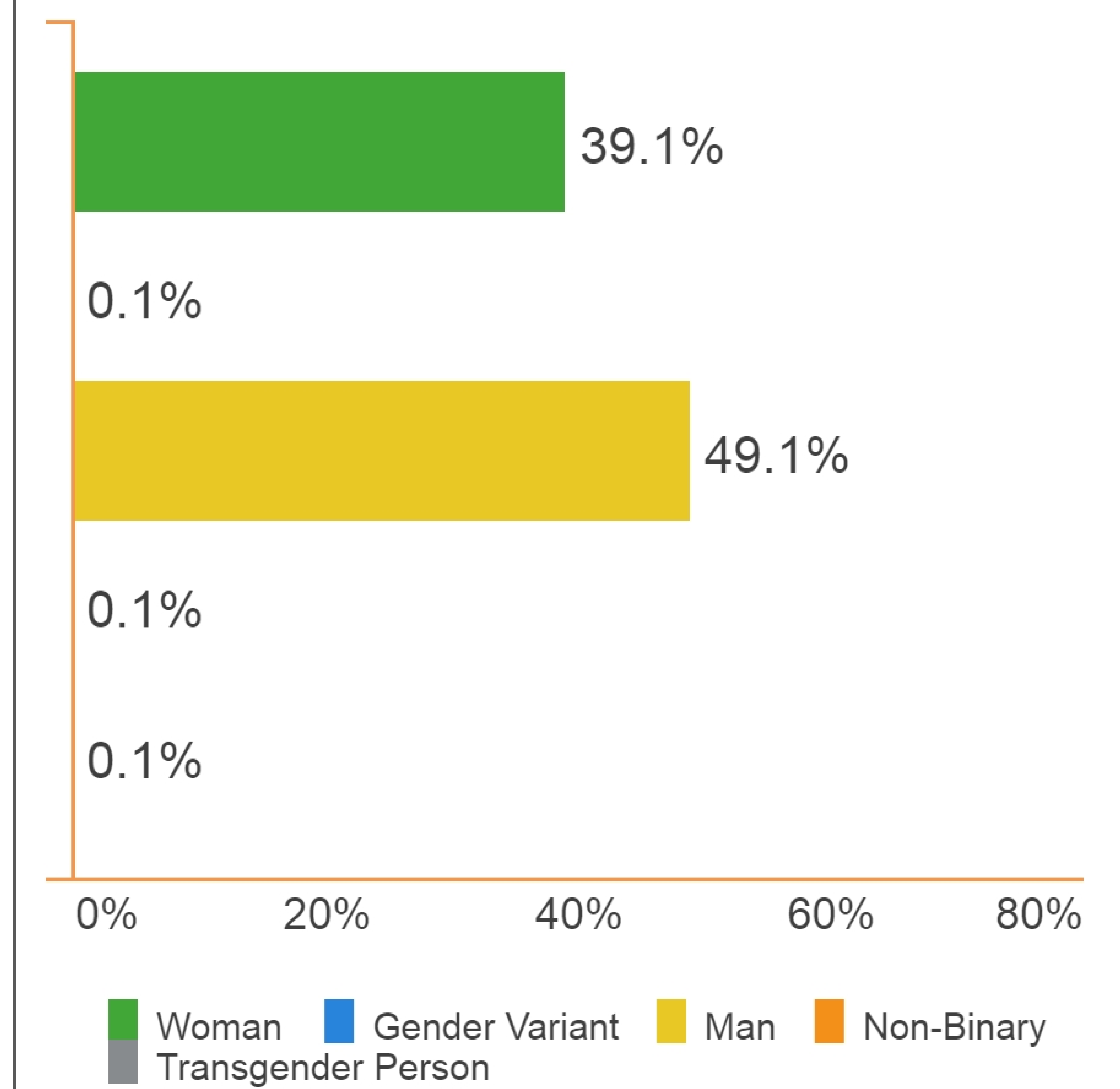
Age



Income



Gender



Research Methodology Snapshot - Commercial

Methodology Digital / Phone	No. of Completes 46	No. of Questions 28*	Incentive None	Sample Customer List
Target Commercial Customers	Quality Assurance Dual-level**	Margin of Error 13.9%	Confidence Level 95%	Research Dates June 28 - July 27, 2021

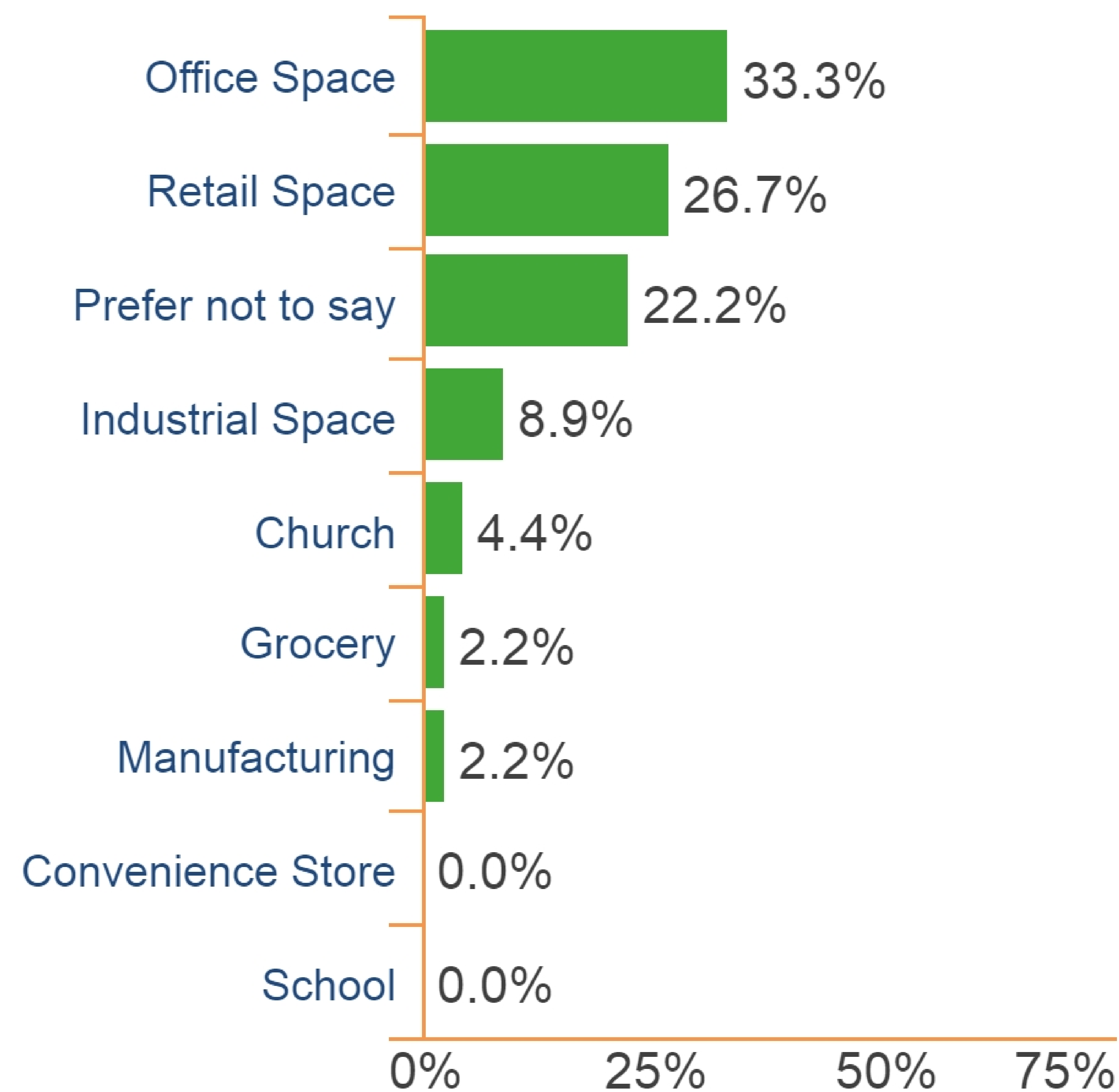
* This represents the total possible number of questions; not all respondents will answer all questions based on skip patterns and other instrument bias.

** Supervisory personnel, in addition to computer-aided interviewing platform, ensure the integrity of the data is accurate.

Respondent Snapshot - Commercial

This slide quantifies select data points to provide context for this research study. The data is not meant to be proportional to population contribution, rather to provide an empirical view into the firmographic profile of the participants.

Type of Business



Number of Employees

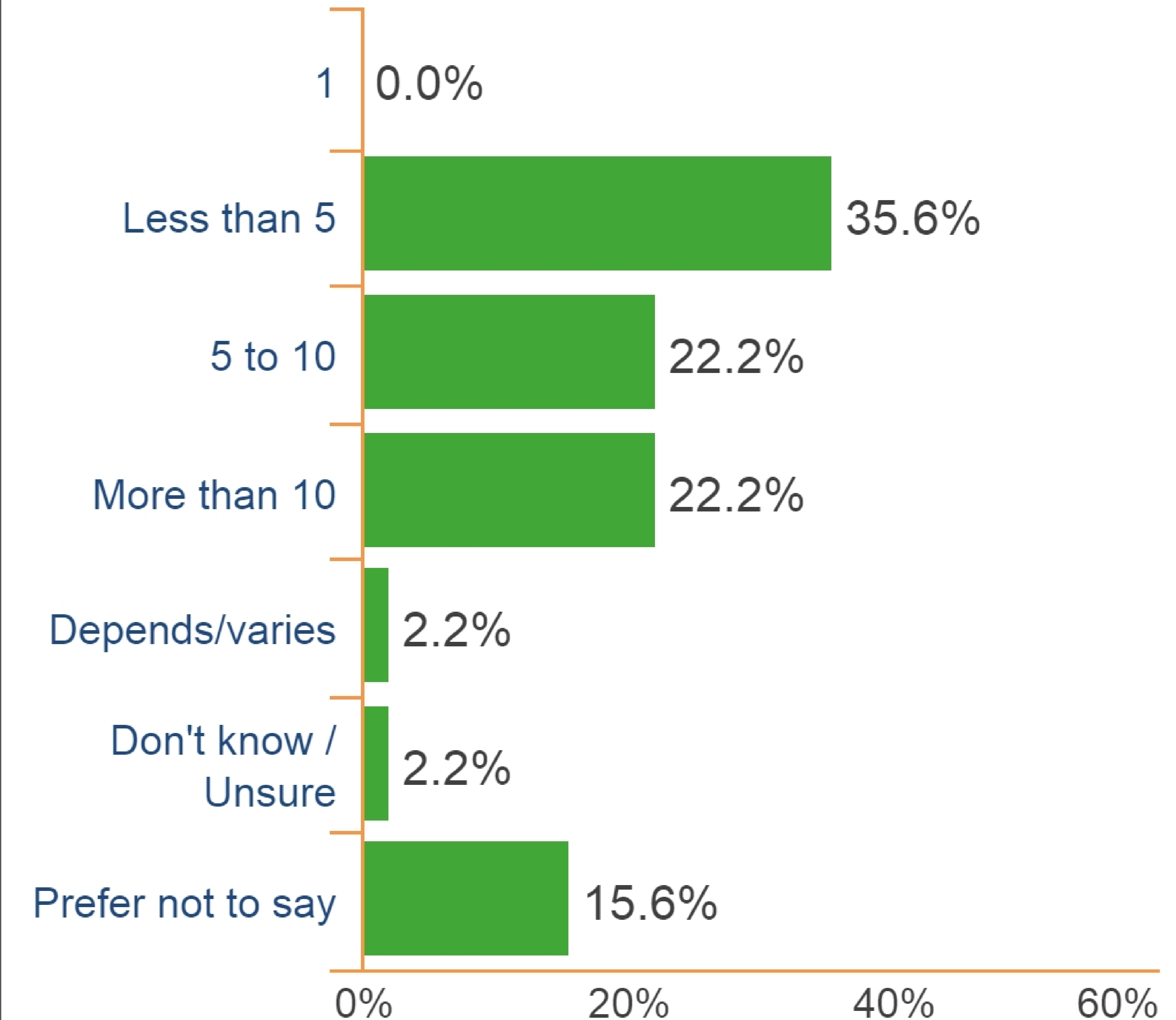


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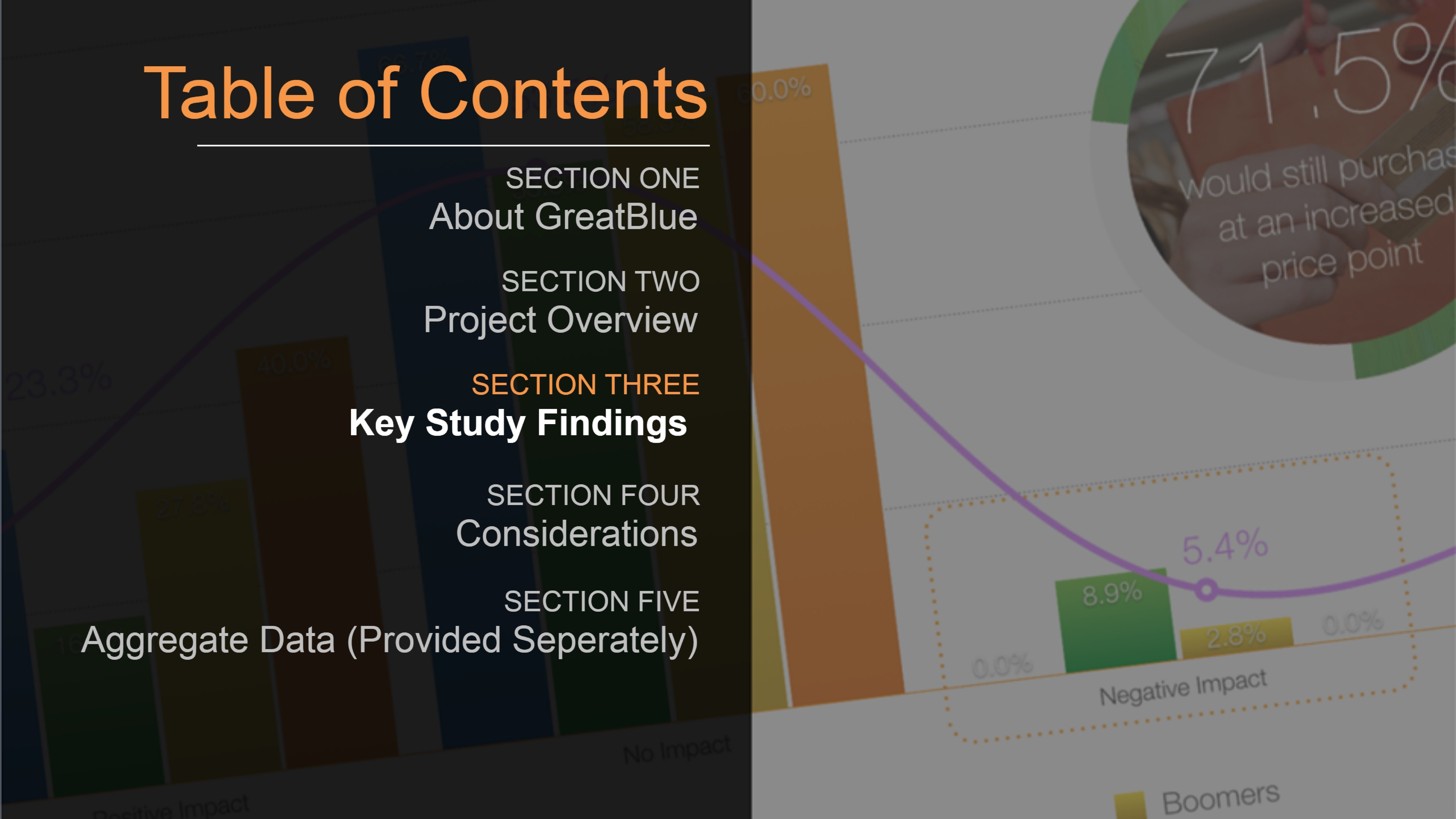
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Key Study Findings - *Communicate smart meter cost information to customers*



What we learned:

When asked if they had any questions or concerns regarding smart meters, nearly one-fifth of residential and commercial respondents reported having concerns about the cost of smart meters, including the cost of upgrading and installing smart meters, and any savings customers may experience after installing the smart meters.

Takeaway:

Customers' primary concerns regarding smart meters are pertaining to cost, as customers have questions about the cost to install smart meters, and how much money smart meters will help customers save.

Actionable strategy:

In communication materials about smart meters to be installed in Concord, CMLP should include information about the overall cost of installing smart meters, both for the utility and the customer, the approximate amount of money customers would save by upgrading to smart meters, and instructions of energy consumption changes customers should make in order to see the greatest cost savings, such as using electricity at off-peak hours of the day.

Key Study Findings - *Communicate outage restoration efficiency in smart meter communication*



What we learned:

Over four-fifths of residential and commercial respondents reported it is important to them that "the meter will alert CMLP if your power goes out so CMLP can get to work right away restoring your power," and more customers prioritized this benefit of smart meters than other benefits mentioned.

Takeaway:

Customers placed the greatest importance on the improved outage response time that would result from a smart meter being installed at their home.

Actionable strategy:

When providing information to customers about smart meters and the benefits of installing a smart meter, CMLP should prioritize information about the ability of the meters to alert CMLP of a power outage, so they can tend to the situation as soon as possible, as this information will likely resonate with the majority of customers and help build support for smart meter installation in Concord.

Key Study Findings - *Build overall awareness of smart meters*



What we learned:

Nearly two-fifths of residential respondents and one-third of commercial respondents reported they were aware of smart meters. Further, when asked what they know about smart meters, over one-half of residential respondents and three-quarters of commercial respondents indicated "nothing / not much."

Takeaway:

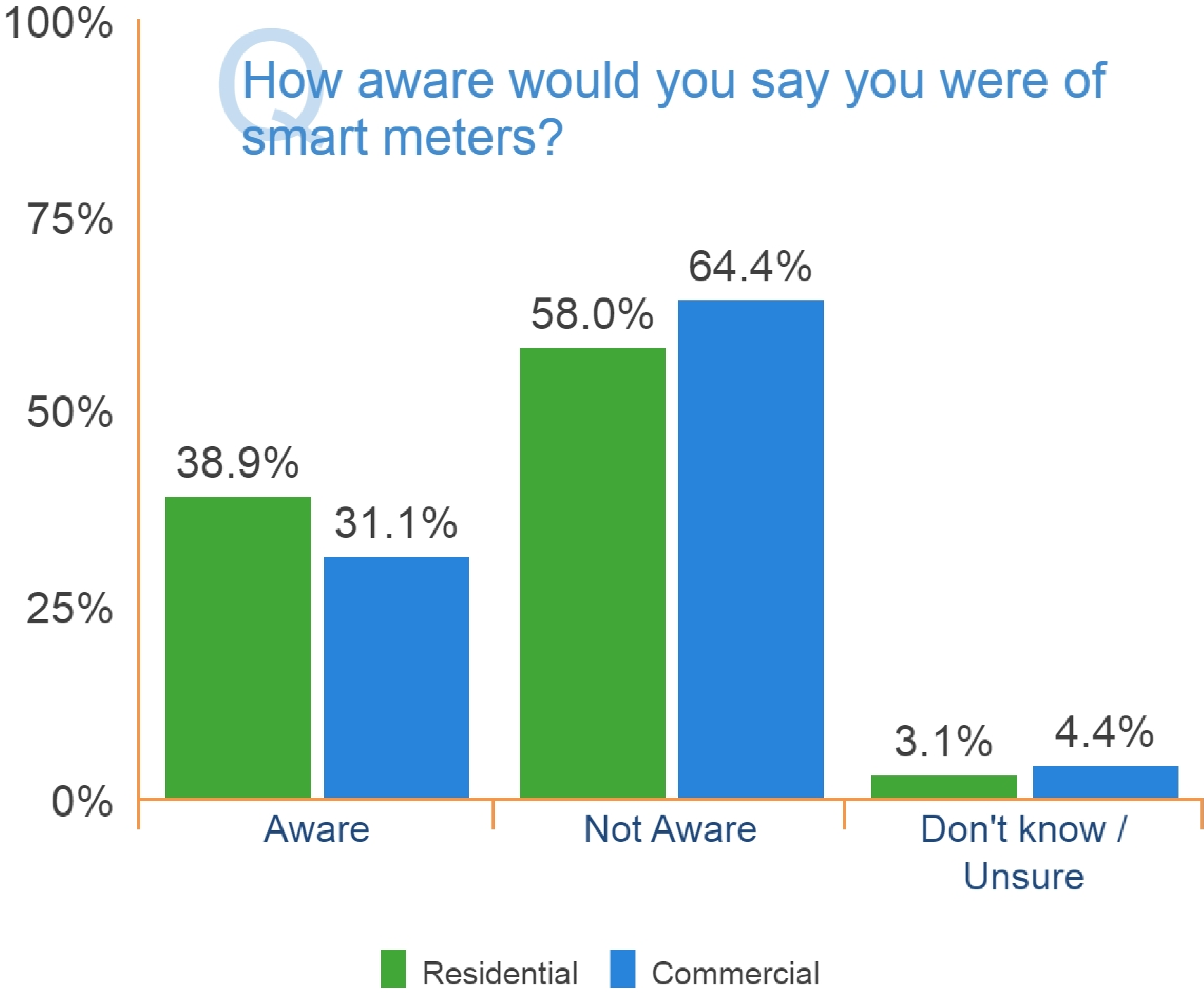
CMLP customers are largely unaware of the concept of smart meters, and may need more information about the benefits of smart meters in order to determine whether they are interested in installing one at their house or business.

Actionable strategy:

In order to help build support for installing smart meters at houses and businesses in Concord, CMLP should increase the frequency of communication and educational materials about smart meter installation they produce, specifically regarding the benefits of smart meters to customers and CMLP as a whole.

Most Unaware of Smart Meters

Less than two-fifths of surveyed residential customers (38.9%) and less than one-third of commercial respondents (31.1%) indicated they were aware of smart meters. While the majority of residential (52.2%) and commercial (75.6%) respondents reported they know "nothing / not much" about these new smart meters, others reported knowledge of the "wireless / remote reading and monitoring" (11.6% residential, 2.2% commercial) and the ability of smart meters to "track / collect / provide real time usage information" (10.5% residential, 8.9% commercial).



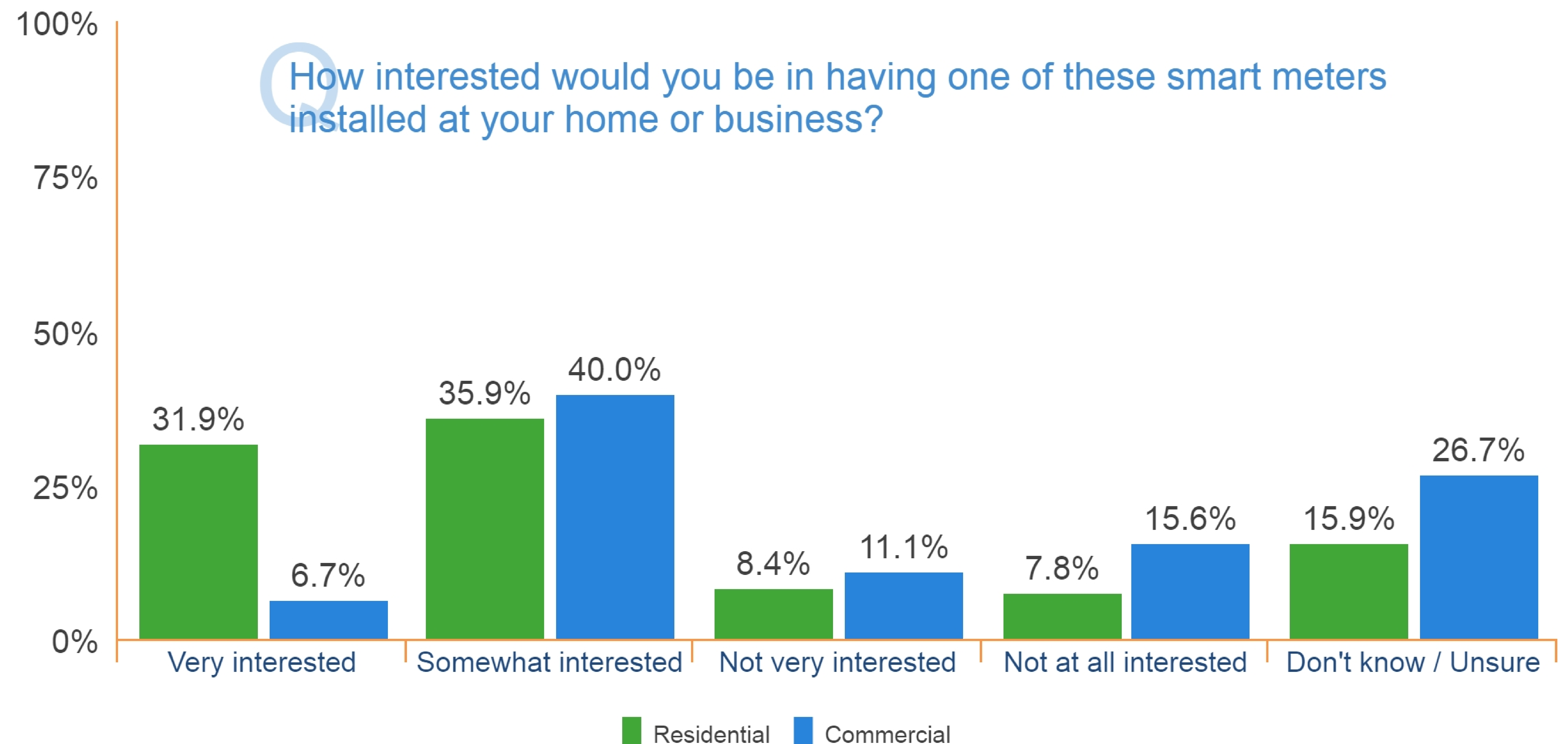
What, specifically do you know about these new smart meters?
(Top 9 values shown)

	Residential	Commercial
Nothing / not much	52.2	75.6
Wireless / remote reading & monitoring	11.6	2.2
Track / collect / provide real time usage information	10.5	8.9
Time of use specific / rates / billing	5.7	0.0
General concept / they're smart / they exist	5.3	2.2
2 way communication	1.9	0.0
Regulate / management	1.8	2.2
Other	1.4	2.2
Don't know / unsure	0.7	6.7

Some Interested in Smart Meter Installation

After reading a description of the smart meters CMLP intends to install, over two-thirds of surveyed residential customers (67.8%) and nearly one-half of commercial respondents (46.7%) indicated they would be either "very interested" or "somewhat interested" in having one of these smart meters installed at their home or business.

These new meters look like the current meter on your home, but what makes them different is they allow two-way communication between CMLP and its customers. These are digital meters that measure electricity usage frequently throughout the day and they are often called "smart meters."



Find Ability to Alert CMLP of Power Outage Important

When rating the importance of several benefits of smart meters pertaining to a customer's personal experience with CMLP, over four-fifths of residential (89.1%) and commercial (86.7%) respondents indicated it is important that "the meter will alert CMLP if your power goes out so CMLP can get to work right away restoring your power." Further, over two-thirds of residential respondents (68.4%) and over one-half of commercial respondents (55.6%) reported it is important that these smart meters allow customers to "have access to an online dashboard that will show you your energy usage."

Below is a list of benefits of smart meters. Please indicate how important each is to you using a scale of one to ten where one (1) is "very important" and ten (10) is "not at all important." (Total "important" ratings of one to four).

	Residential	Commercial
The meter will alert CMLP if your power goes out so CMLP can get to work right away restoring your power.	89.1	86.7
You will have access to an online dashboard that will show you your energy usage . You can use this tool to save energy and money.	68.4	55.6
You will be able to start and stop service without needing a visit from a technician and so it can be scheduled at your convenience.	45.1	57.8
You will be able to set bill alerts to notify you when your usage has reached a certain threshold – you set the threshold.	44.1	46.7

Efficient System Management Important to Customers

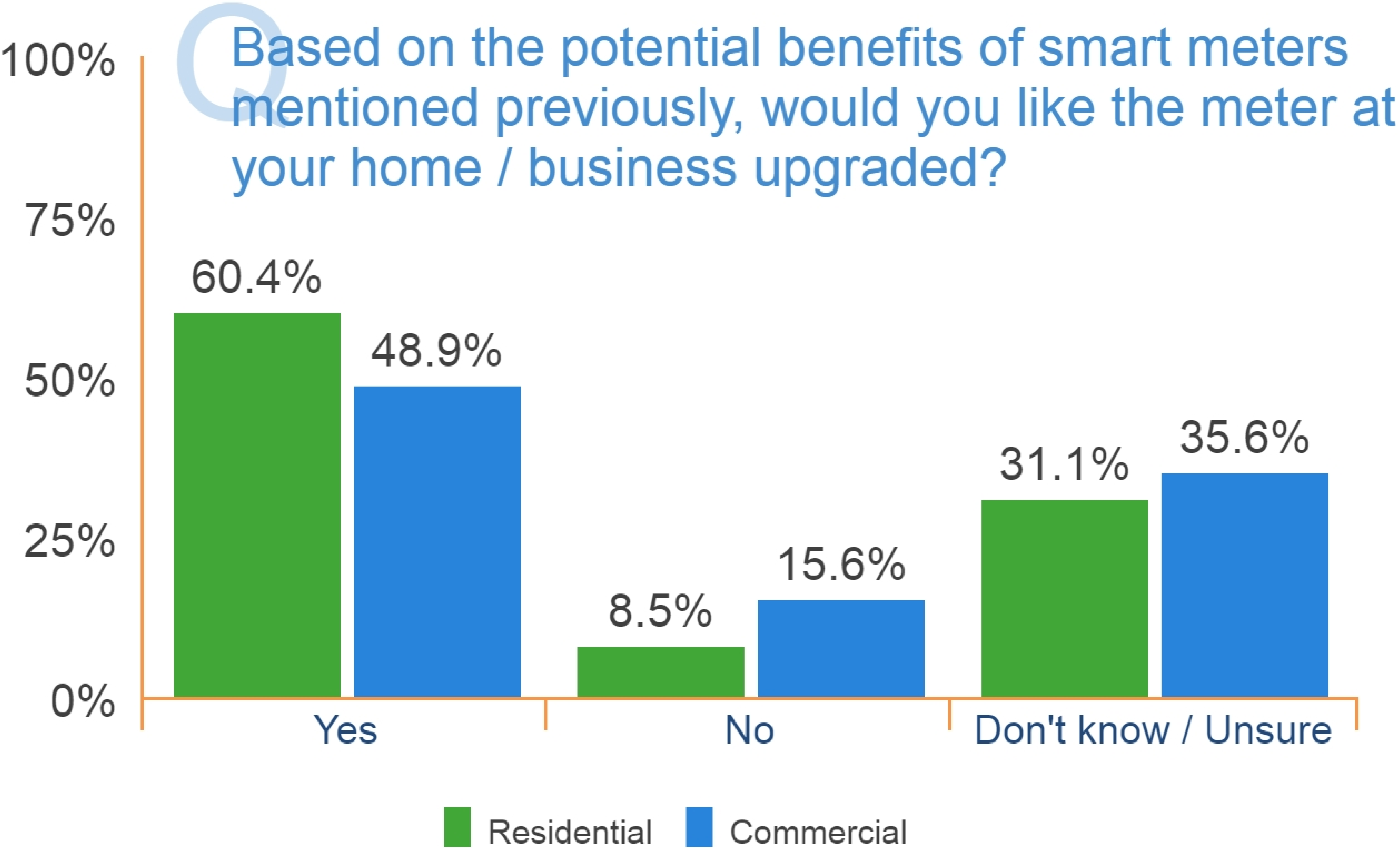
When evaluating the importance of several benefits of smart meters pertaining to CMLP as a whole, over four-fifths of surveyed residential customers (84.2%) and more than three-quarters of commercial respondents (77.8%) indicated it is important that "the new metering system will enable CMLP to manage the system more efficiently" to "help keep costs down and improve reliability." Further, roughly three-quarters of residential respondents reported it is important that "the meter upgrade is necessary to help CMLP plan for and accommodate the additional demand on the electric system" due to an increased interest in hybrid and electric vehicles and home solar (78.8%) and that "smart meters are needed to enable time of use rates and other rate plans that can help customers save energy and money" (75.0%).

Below is a list of benefits of smart meters. Please indicate how important each is to you using a scale of one to ten where one (1) is “very important” and ten (10) is “not at all important.” (Total "important" ratings of one to four).

	Residential	Commercial
The new metering system will enable CMLP to manage the system more efficiently. This will help to keep costs down and improve reliability.	84.2	77.8
Studies show that consumers are increasingly interested in hybrid and electric vehicles and home solar, and the meter upgrade is necessary to help CMLP plan for and accommodate the additional demand on the electric system.	78.8	64.4
Smart meters are needed to enable time of use rates and other rate plans that can help customers save energy and money.	75.0	66.7
CMLP will have fewer trucks on the road, which will help in reducing carbon emissions.	63.4	66.7

Have Questions and Concerns Regarding Meter Cost

Based on the potential benefits of smart meters mentioned in the survey, three-fifths of residential respondents (60.4%) and nearly one-half of commercial respondents (48.9%) reported they would like the meter at their home or business to be upgraded. However, nearly one-fifth of residential (17.3%) and commercial (17.8%) respondents had questions or concerns regarding the "cost (upgrade, installation, rates, bill, savings, etc.)."



Do you have any questions or concerns regarding smart meters? If so, please explain. (Top 11 values shown)

	Residential	Commercial
None / not at this time	48.6	66.7
Cost (upgrade, installation, rates, bill, savings, etc.)	17.3	17.8
Need more information (benefits, downside, cost ratio, etc.)	6.1	0.0
Privacy / security concerns	5.3	2.2
Renter / not my decision	3.0	0.0
Relationship between / solar / net metering / battery backup, etc.	2.8	0.0
Availability to Condo owners, gated communities, etc.	1.6	4.4
Other	1.4	2.2
Data sharing / pros / cons	0.5	2.2
Job eliminations / FTE's	0.3	2.2
Opt out option	0.2	2.2

Commercial Customers Not Able to Shift Load

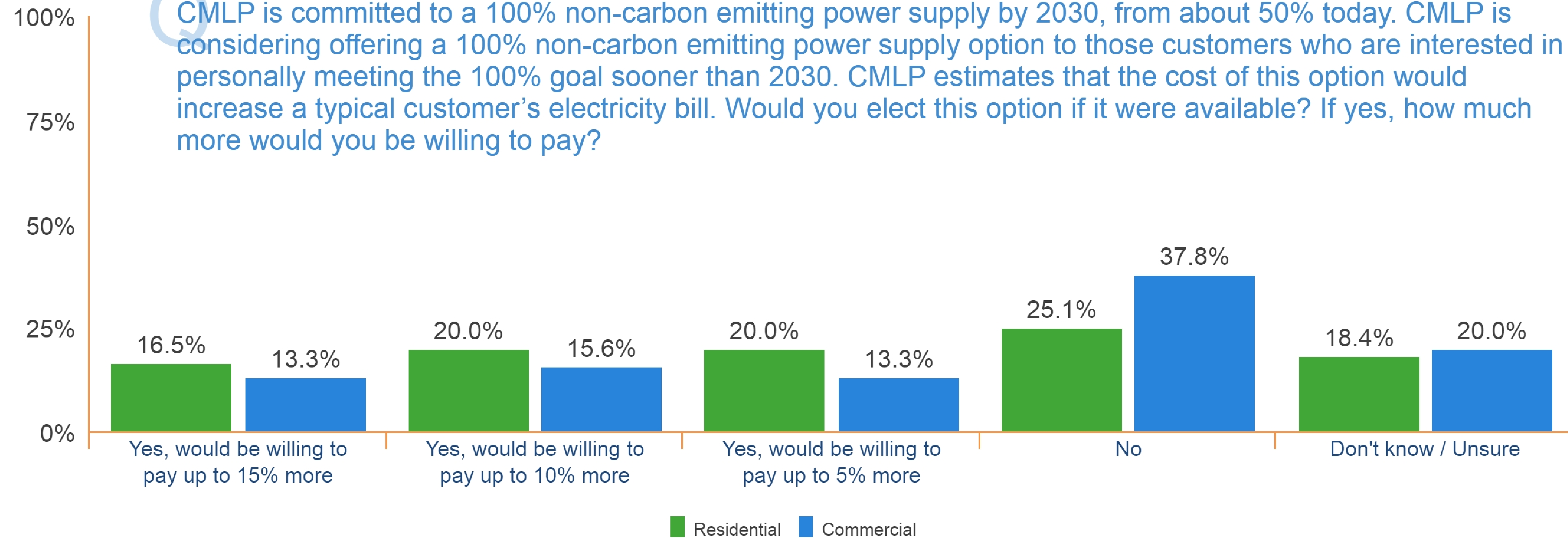
Two-thirds of surveyed commercial customers (66.7%) reported their organization would not be able to shift their load to use electricity at more off-peak hours of the day, if their company were to receive pricing benefits for doing so, while 13.3% of commercial respondents indicated their organization would be able to shift its load, and one-fifth (20.0%) were unsure.



Willing to Pay Extra to Achieve Non-carbon Power Sooner

While one-quarter of residential respondents (25.1%) and over one-third of commercial respondents (37.8%) indicated they are not willing to pay any additional amount on their electric bill to help CMLP achieve its 100% non-carbon emitting power supply initiative prior to 2030, 20.0% of residential respondents and 13.3% of commercial respondents reported they would be willing to pay up to 5% more, and 20.0% of residential respondents and 15.6% of commercial respondents would be willing to pay up to 10% more.

CMLP is committed to a 100% non-carbon emitting power supply by 2030, from about 50% today. CMLP is considering offering a 100% non-carbon emitting power supply option to those customers who are interested in personally meeting the 100% goal sooner than 2030. CMLP estimates that the cost of this option would increase a typical customer's electricity bill. Would you elect this option if it were available? If yes, how much more would you be willing to pay?



Customers Find CMLP a Reliable Brand

Over four-fifths of residential (82.1%) and commercial (82.2%) respondents reported the characteristic "reliable" describes CMLP well, while roughly three-quarters of surveyed residential customers indicated the characteristics "trustworthy" (78.2%), "responsive" (75.1%) and "provides value" (74.6%) describe CMLP well.

Additionally, three-quarters of commercial respondents reported the characteristics "cares about customers" (75.6%) and "forward-thinking" (75.6%) describe CMLP well.

Below is a list of characteristics regarding the service you receive from CMLP. For each, please indicate how well each describes CMLP using a scale of one to five where one (1) "describes CMLP very well" and five (5) "does not describe CMLP at all." (Total "1" and "2" ratings shown)

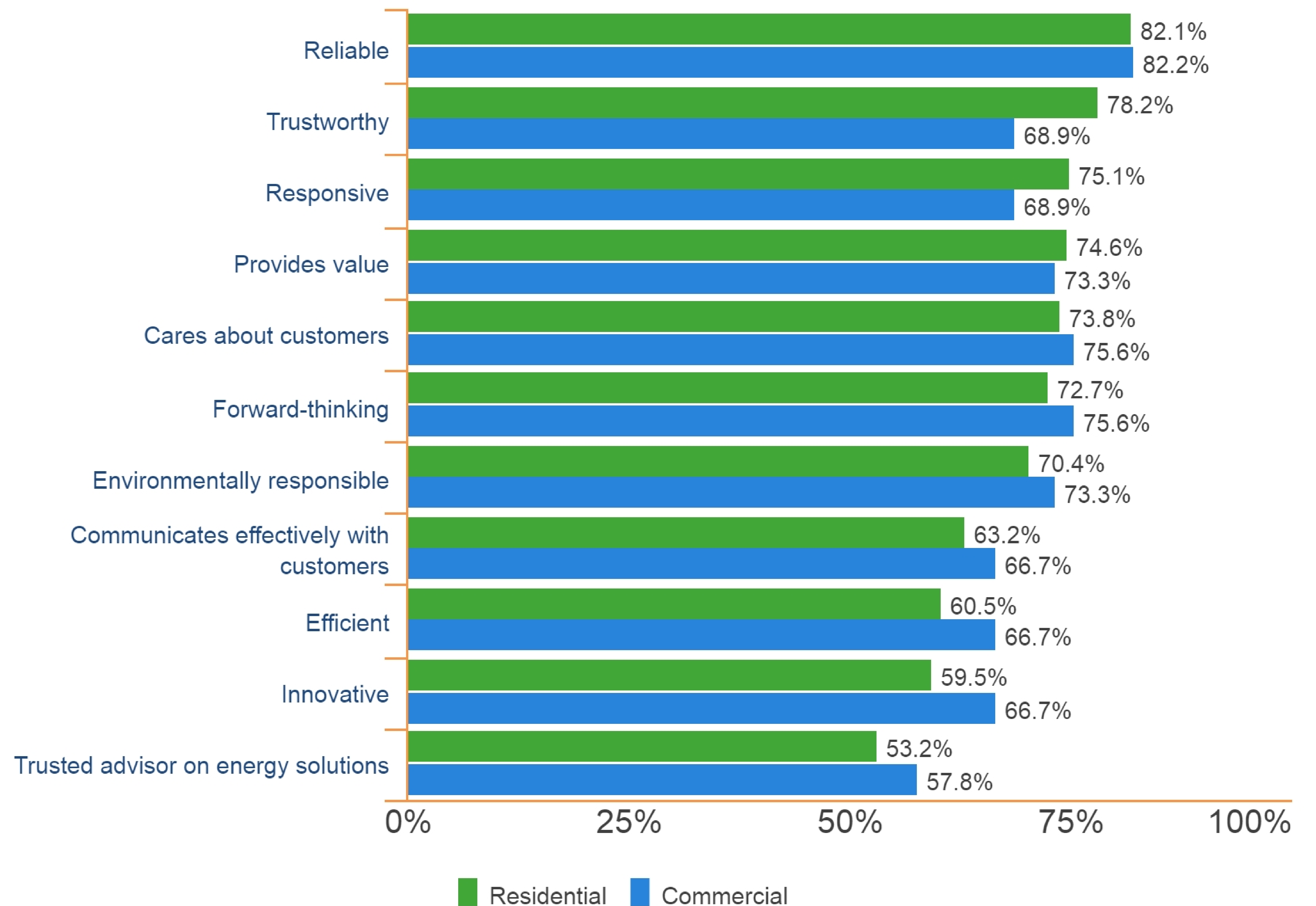


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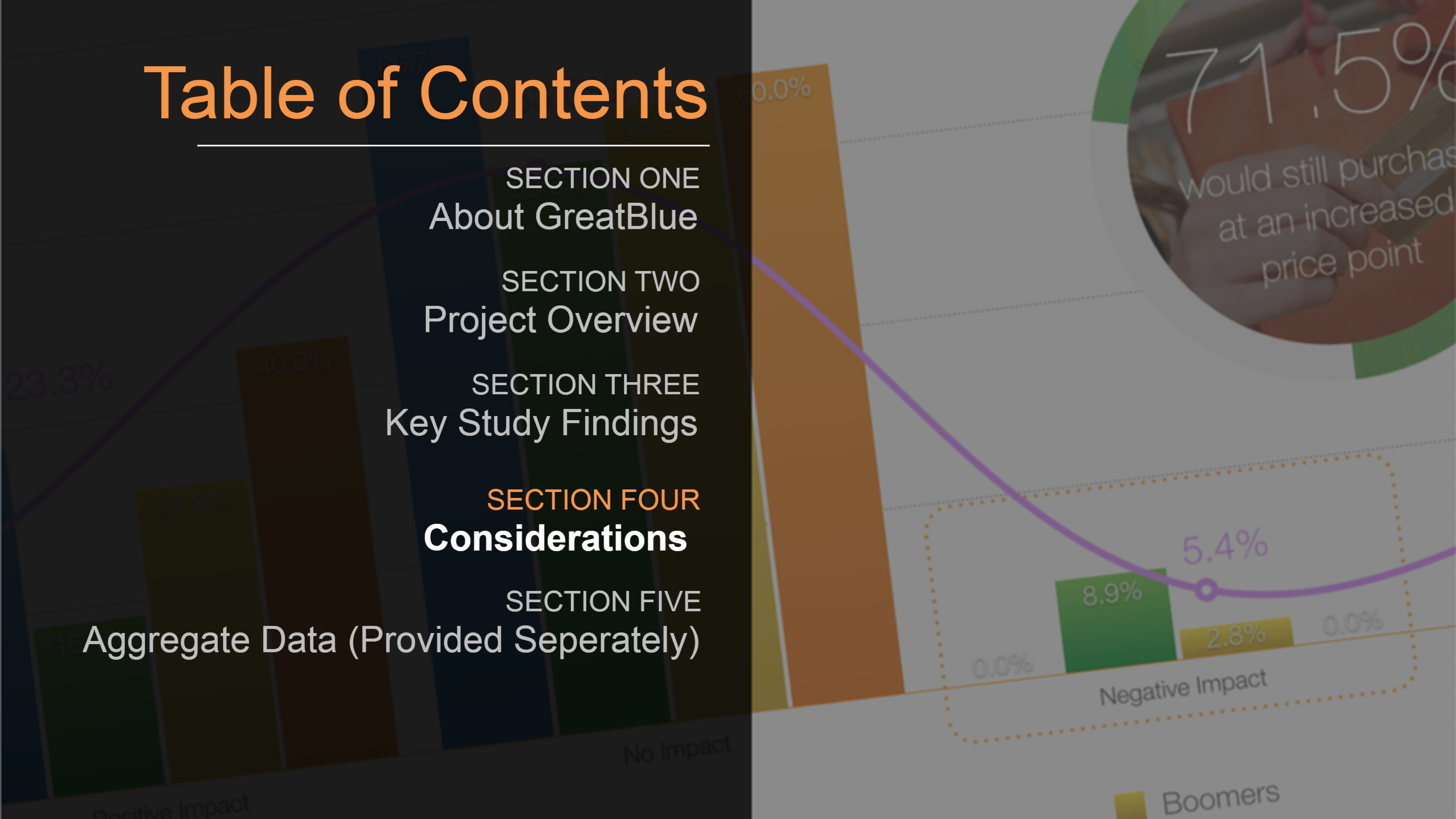
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Considerations

- **Communicate cost information of smart meters to customers.** When asked if they had any questions or concerns regarding smart meters, nearly one-fifth of residential and commercial respondents reported having concerns about the cost of smart meters, specifically of upgrading and installing the meters and cost savings customers would see after upgrading to smart meters. For this reason, it is recommended that in communication materials about the smart meter upgrade, CMLP include information about the cost of installing smart meters, both to CMLP and the customer, approximately how much money in cost savings customers could expect to see on their electric bill after installing a smart meter, and the energy consumption adjustments customers should make in order to see the greatest cost savings. These communication materials may help address any concerns customers have about the expense of upgrading their meters, and help customers better visualize the benefits of installing smart meters from a financial perspective. By addressing these concerns, CMLP may help to build customer support for installing smart meters in town.
- **Educate customers of increased outage response efficiency smart meters result in.** Of the benefits of smart meters mentioned in the survey, more residential and commercial customers indicated it is important to them that "the meter will alert CMLP if your power goes out so CMLP can get to work right away restoring your power." Knowing that prompt outage response time is important to customers, it is suggested that in communication materials regarding the smart meters, CMLP communicate how the meters work to notify CMLP of a power outage so they can tend to the situation immediately and reduce the amount of time the customer is without power. This information will likely resonate with the majority of customers and may help to build support among customers for smart meter installation in Concord.

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